

## Reciprocity Request Form



**Address:** 100 Marine Parkway | Suite 125  
Redwood City, CA 94065  
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**Toll-Free:** (800) 339-0761  
**Fax:** (650) 591-1488  
**PONY:** RET 141  
**Web:** [www.samcera.org](http://www.samcera.org)  
**Email:** [samcera@samcera.org](mailto:samcera@samcera.org)

Even if you have told us about your prior employment, you must submit this completed Request for Reciprocity form to establish reciprocity with your prior retirement system. Your prior retirement system has its own reciprocity election form which needs to be submitted to that system.

**What is reciprocity:** Reciprocity allows you to move among California public retirement systems and maintain earned retirement benefits. There are important points to consider before electing reciprocity, so read SamCERA's "**Reciprocity Guide**" and this form carefully before submitting it to SamCERA.

**Eligibility to Establish Reciprocity:** You may be eligible for reciprocity if you: (1) were a member of a California public reciprocal retirement system; (2) have less than a six month gap between active membership in that system and your SamCERA membership; and (3) left your funds on deposit (or redeposited your funds) with that prior retirement system.

Sample Reciprocal Systems: CalPERS (California Public Employees' Retirement System)  
CalSTRS (State Teachers' Retirement System) --  
CERL Counties (County Employees Retirement Law)  
SFERS (San Francisco Employees' Retirement System)  
Federated City Employees Retirement System (City of San Jose)

A complete list of the reciprocal systems can be found in SamCERA's "**Reciprocity Guide**". *Contact SamCERA to verify if a retirement system not listed is reciprocal with SamCERA.*

- **Plan 7 Members:** If you became a member of your prior reciprocal system before January 1, 2013, and SamCERA determines that you are eligible for reciprocity, you will be placed in Plan 5 or Plan 6, which have higher contributions but provide a higher pension benefit. For this change to happen, you can but you do not need to elect reciprocity. *Contact SamCERA before submitting this form.*

**Rights and Responsibilities:** If you become a reciprocal member, note the following rights and obligations:

- Service credit earned under each system may be used to meet each system's vesting and retirement eligibility requirements. Note: The service credit does not transfer from one system to another and service credit years are not combined for purposes of calculating your benefits in each system.
- Your highest pensionable compensation earned in any reciprocal agency will be used by all reciprocal systems to determine your "final compensation" subject to each reciprocal system's rules governing which pay items are considered pensionable.
- Your SamCERA contribution rate will be based on your age of entry when you became a member in the first reciprocal retirement system. (This does not apply to Plan 7 members.)

**Note if you establish reciprocity:**

- You must leave your contributions and interest, on deposit with the reciprocal system while you are an active member of SamCERA.
- You must retire concurrently from all systems.
- It might not be advantageous for you to apply for disability retirement. This is because sometimes the amount you would receive with a service retirement benefit exceeds the amount you would receive with a disability retirement benefit. Also, with certain disability retirement benefits you may only be entitled to an annuity based on your contributions from your prior system.

**Reciprocity Request Form (continued)**

**Member Information**

Last Name	First Name	Middle Initial
Last 4 Digits of Social Security Number	Employee ID #	

**Qualifying Reciprocal Membership Information**

I worked for the following California public agency, am a member of its retirement system, had less than a six-month gap in service between that employment and my SamCERA membership, and left my funds on deposit (or redeposited my funds) with that retirement system.

Name of Public Agency	Last Date of Employment With that Public Agency	My funds are on deposit with the Agency's retirement system. <input type="checkbox"/> Yes <input type="checkbox"/> No	
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**Certification & Signature**

**I acknowledge and understand the following:**

**I have received SamCERA's member booklet, "First Things First: Your Guide to SamCERA Retirement Benefits" and/or "Reciprocity Guide,"** which generally describes the rights and responsibilities of reciprocity. I understand that I may request additional information from SamCERA about reciprocity. I understand that am not obligated to establish reciprocity, even if I am eligible to do so.

**Upon completing and signing this form, my decision to establish reciprocity is final and irrevocable.** I understand that once I have elected reciprocity, I cannot revoke my decision and I cannot withdraw my funds from my reciprocal retirement system.

Signature ( <i>print this form and sign</i> )	Date
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**Return this form to SamCERA:**

San Mateo County Employees' Retirement Association  
100 Marine Parkway, Suite 125  
Redwood City, CA 94065